

Buschbach Insurance Agency, part of the InsureOne Family
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EXCESS/UMBRELLA SUBMISSION CHECKLIST

To improve our response time and reduce our requests for additional information, please complete this checklist when sending us an Excess Liability or Umbrella submission.

Applicant's Name: _____

REQUIRED INFORMATION:

- Complete application, including the general information section.
- Detailed description of operation for each Named Insured.
- Five-year loss history aggregated by year and by underlying coverage.
- A description of all losses of \$100,000 or more.
- Payroll, subcontracted cost, gross receipts.
- Number of vehicles by class, radius and use.
- Vehicle safety, maintenance and hiring practices of drivers for transportation accounts.
- Underlying insurance including: terms and conditions, line of business, limits, how aggregate applies, coverage type – occurrence or claims made, and defense costs inside or outside of the limit.
- Underlying carrier and premium, if known.

For priority handling, please complete the following account summary:

Effective date: _____ Needed by: _____ No. years in business: _____
 Location: _____ Coverage: _____ Policy Limit: _____
 Description of Operations: _____

Loss History:

Year	General Liability	Auto Liability	Other	Description of Losses (greater than \$100,000)
Total				

Underlying Insurance:

Coverage	General Liability	Auto Liability	Employers Liability
Limits			
Carrier			
Premium			
Terms and Conditions			